



Department of Education
Office of Student Financial Assistance

Saba Configuration Documentation

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Executive Summary

A Learning Management System (LMS) will support the administration, delivery and integration of external training sponsored by SFA. The LMS is the critical component in SFA University's strategy to improve the delivery of training services to SFA employees and external customers. When implemented, external customers will be able to access targeted learning more accurately and quickly while enabling SFA to deliver these services in a proactive manner with greater consistency and efficiency. Saba is the SFA-selected LMS.

The configuration of Saba is a critical step towards implementing an LMS that meets SFA University's business needs and technical requirements. This document describes the three-step approach followed when configuring Saba, including a description of each of the configuration steps listed below, key consideration questions, and the configuration decision made by SFA University. SFA University made its configuration decisions after being briefed on the configuration areas and reviewing the configuration recommendations and rationale.

The configuration steps for Saba include:

- Setting the domain structure
- Determining the roles and security lists
- Deciding on the business rules

Configuration Step 1: Domain Structure

Description

Domains are an administrative tool used for organizing and categorizing business objects within Saba. Business objects in Saba store the different functional components (e.g. users, educational products, customers) required to set up and operate a Learning Management System. Domains have the following characteristics:

- All business objects within Saba must belong to a domain
- The domain structure or hierarchy can be defined by the user
- Domains can be used to:
 - Assign business rules
 - Assign email notifications to recipients
 - Define objects within the data directory
 - Partition the learning catalog

All business objects stored in Saba 3.4 such as courses, locations, clients and employees, must belong to a domain. The domain to which a business object is assigned is known as its security domain. Access privileges are granted to objects within security domains. Users are not automatically given access privileges to objects within their security domain; such privileges must be assigned.

Objects can belong to only one security domain. User objects, however, are assigned a second type of domain, referred to as a home domain. Since users are responsible for creating objects,



such as courses and products, the home domain is necessary to assign security domains for these new objects. While the home domain is used as the default security domain for all objects created by the user, the user may edit this assignment during the creation process.

An important characteristic to note is domain inheritance. Domains can be used to assign business rules and notifications and define objects within the data dictionary. Any rule that is assigned at a parent level will be inherited by all of the sub-domains within that branch.

The basic Saba installation provides one domain, the world domain. The world domain alone can be used for the organization of all business objects. Recommended methods for structuring domains include using departmental organizations, geographical distributions or a hybrid of the two or more criteria. Figure 1.1 below is an example of a typical domain structure.

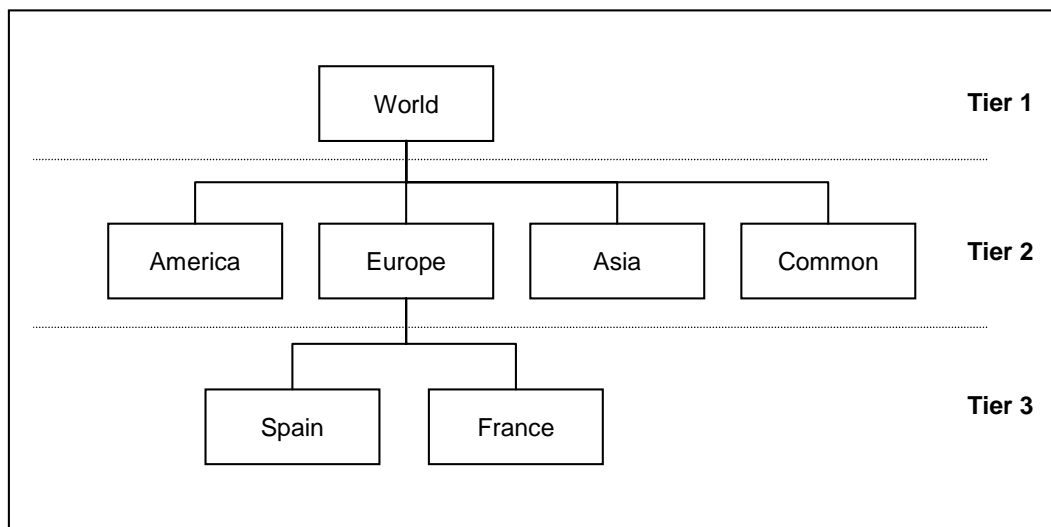


Figure 1.1 A domain structure organized by geographical region

As noted above, the world domain is included in the custom installation. All of the domains are children of the world domain. There is a maximum of three domain tiers and a total maximum of approximately forty domains within tiers 2 and 3.

Key Questions

- What are the requirements for the system?
- Are there logical categories or groupings in the company/organization, regions, or management levels?
- Are there specific laws or policies associated with areas that might require specific security privileges assigned by domain?

Approach for SFA University



The initial phase of SFA's learning management system is intended for the registration of external users in training conferences and workshops. Internal SFA staff may also attend these events. Because this event is open and available to both user groups, without restrictions, these training events will reside in the common domain, as described above. Therefore, the figure below is the recommended domain structure for SFA.

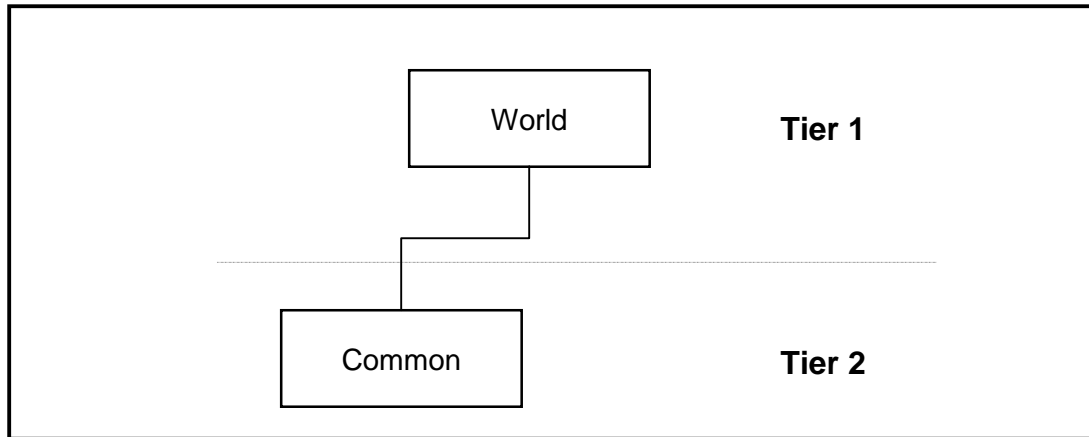


Figure 1.2: The selected SFA domain structure.

All business objects should reside in the common domain with only two exceptions: employees and category definitions. This domain structure meets the current business requirements, while still providing the flexibility to support future LMS business needs. For example, if internal training events are to be added to the catalog in the future, those training events should only be available to internal SFA staff. This would require the addition of an exclusive domain particular to internal users only. External users would not have access to the training in this domain.

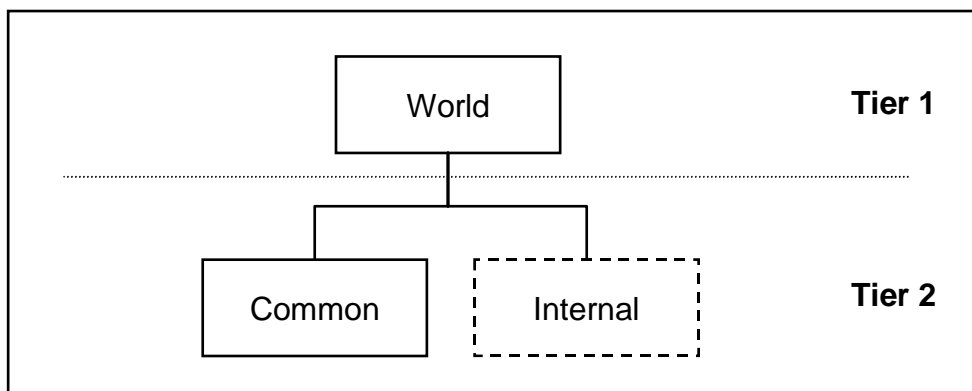


Figure 1.3: Future Domain Structure if, for example, internal users were added to the Saba LMS user population



As depicted in the previous example, this future domain structure would allow for an additional layer of categorization. Training courses placed in the internal domain could only be viewed and accessed by internal users. Courses that reside in the common domain would be accessible to both internal and external users. This domain structure allows for maximum flexibility for future SFA requirements.

Configuration Step 2: Roles & Security Lists

Description

Defining roles for system users is an important step of implementing a web-based system. These roles, when used in conjunction with security lists, establish access control within Saba by setting access rights at an individual user level. An individual user's role contains one or more security lists that specify the actions a user can and cannot perform in the system. For administrators, security lists dictate to which administrative modules they have access. Security lists also control the reports an administrator can run on the system.

Key Questions

- What are the business requirements for LMS implementation at SFA?
- Who will use the Learning Management System?
- What actions will the user need to perform in the system?
- What skills are needed to perform these actions?
- What system requirements are involved in performing these actions?

Approach for SFA University

By answering the above questions, the following LMS roles were identified:

- End user
- Instructors
- Training Administrator
- System Administrator

After these roles were identified, a security list for each role was developed to control user access privileges. All security lists were configured according to SFA's business requirements. Refer to Appendix A: Roles with Assigned Security Lists for a complete list of the Learning Management System (LMS) roles and accompanying security lists for SFA.

Configuration Step 3: Business Rules

Description

Saba provides a number of predefined business rules and policies used to regulate the general business processes. The business rules are categorized into one of four objects: class, internal order, miscellaneous, and external order. The class object relates to the creation and maintenance of classes; the internal order object relates to internal training and internal users; the



miscellaneous object relates to a variety of disparate rules; and the external order object relates to external training and external users.

Each business rule can either be enabled or disabled. An example business rule taken from Saba is “enable notification.” This rule can have a value of true or false. If the business rule is set to true, it enables the system to send automated email notifications to external users, Training Administrators, or System Administrators. If the business rule is disabled or set to false, then Saba will not send an email notification. Business rules must be set accurately because they instruct the LMS to perform in a specific way. It is important to note, however, that it is easy to change the value of a business rule. An Administrator may change most of the business rules from one value to another quickly and easily.

Key Questions

- What business rules pertain to SFA University? Why?
- Who will this business rule affect? How will it affect them?
- How flexible should the system be?

Approach for SFA University

Each business rule was given a value according to the defined functional and technical requirements. The recommended values for SFA University are underlined and bolded. In most situations, the value that provided the most flexibility was selected. Please refer to Appendix B: Business Rules for a complete list of all the business rules in Saba version 3.4. The document identifies to which object the business rule is aligned, the name of the business rule, the possible and selected values, a description of the rule, and the rationale for why the value was selected for SFA University. Six of the business rules were given a value of TBD (to be determined) because Jamcracker and Saba need to coordinate and provide an answer. As soon as answers are provided, the values will be submitted to SFA University for approval. Also, all of the business rules in the internal object do not have values because they pertain to internal (staff) users, who will not use the Saba LMS to register for training.

Summary

This document has provided detailed information regarding the configuration of the Saba 3.4 learning management system. This phase of implementation is for external users; however, it may include other user groups at a later time. Therefore, the primary focus for the configuration was establishing a flexible system that could be modified as future business needs arise.

The three configuration steps documented above are the foundation of the configuration. Following the completion of these steps, Saba 3.4 must also be configured with data that front-end users will see. This includes adding supplemental product groups, employees, products, courses, equipment and resources.



Appendices

Appendix A

Appendix B

Roles With Assigned Security Lists

Business Rules for Saba 3.4